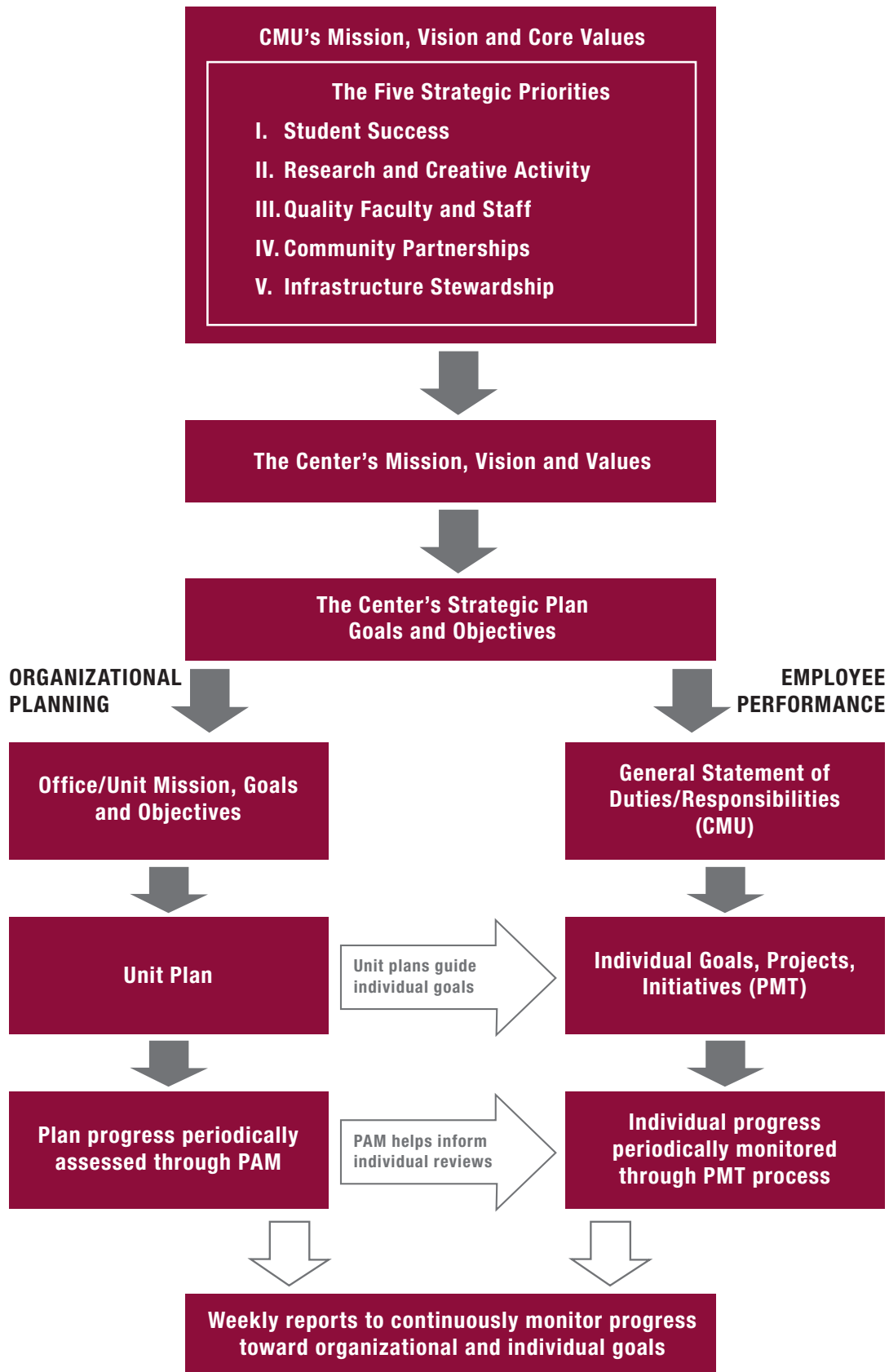


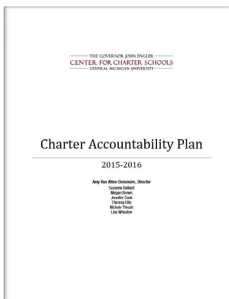
AN OUTLINE OF THE  
CENTER'S PLANNING PROCESS

---

# OFFICE PLANS AND CMU EMPLOYEE PERFORMANCE MANAGEMENT: HOW THEY RELATE

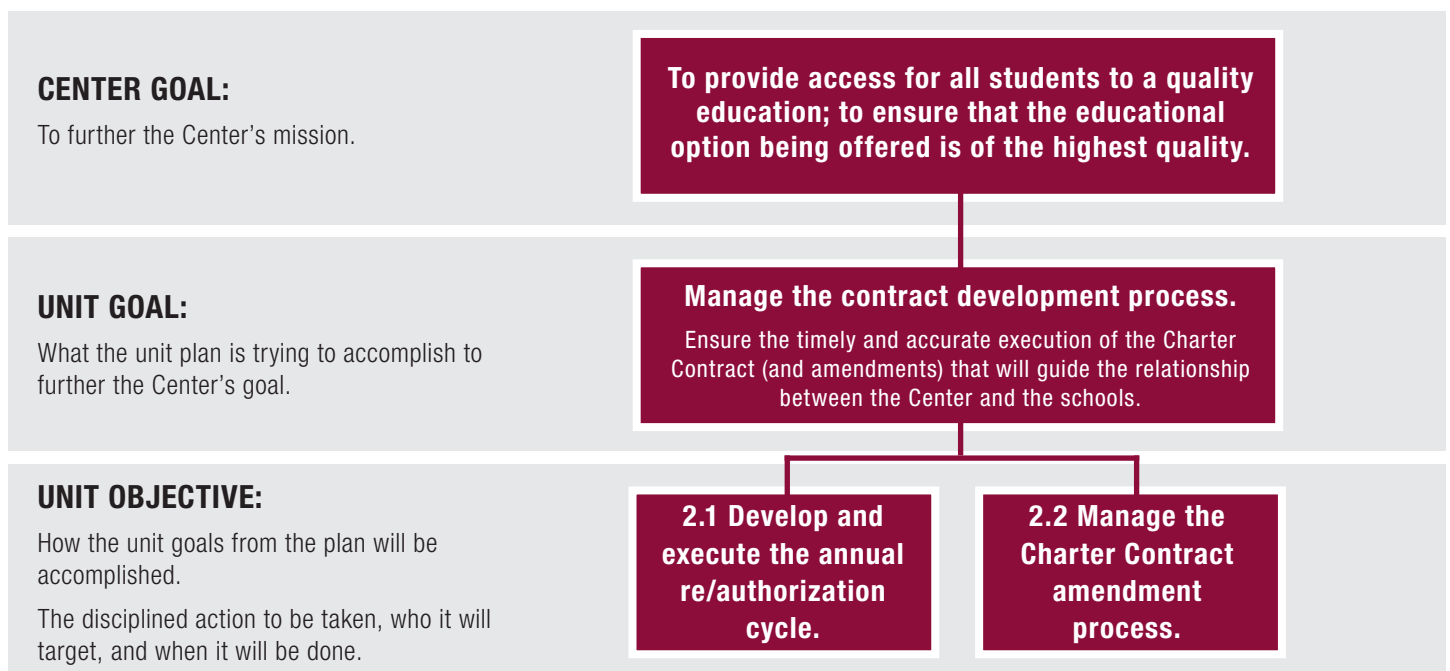


# THE ORGANIZATION OF A PLAN: AN EXAMPLE



The development and adherence to planning is a way to help coordinate and focus office efforts on advancing The Governor John Engler Center for Charter Schools' mission. As such, they are organized in a hierarchy, outlining:

- The **plan's goals** to further the Center's mission.
- The broad **objectives** established to accomplish these goals.
- The **disciplined actions** that will be taken to accomplish objectives.



## MEASURING PROGRESS:

# THE PLAN ASSESSMENT MATRIX (PAM)

2014-2015 Charter Accountability Progress Report  
PLAN Assessment Matrix ("PAM")

Section	Unit Objective	Assessment	On-Track	Not On-Track (Needs Improvement)	Needs Further Attention	Overall Deliverables	Actual	Notes	Notes
1.1	1.1.1 Develop and execute the annual re/authorization cycle.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the annual re/authorization cycle is completed on time and in accordance with the Charter Contract.	2014-2015		
	1.1.2 Manage and execute the Charter Contract amendment process.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the Charter Contract amendment process is completed on time and in accordance with the Charter Contract.	2014-2015		
2.1	2.1.1 Develop and execute the annual re/authorization cycle.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the annual re/authorization cycle is completed on time and in accordance with the Charter Contract.	2014-2015		
	2.1.2 Manage and execute the Charter Contract amendment process.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the Charter Contract amendment process is completed on time and in accordance with the Charter Contract.	2014-2015		
2.2	2.2.1 Develop and execute the annual re/authorization cycle.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the annual re/authorization cycle is completed on time and in accordance with the Charter Contract.	2014-2015		
	2.2.2 Manage and execute the Charter Contract amendment process.	2014-2015	●			Through 12/1 and 2015-2016, the Center will continue to work with schools to ensure that the Charter Contract amendment process is completed on time and in accordance with the Charter Contract.	2014-2015		

The **plan assessment matrix (PAM)** is the part of the plan that measures progress in the plan's implementation. The PAM is divided into two sections:

- A **schedule of deliverables** that tracks the completion of unit objectives/disciplined actions and outlines their outcomes.
- A **measurement of changes (the plan's net impact)** that shows the alignment of the unit plan's goals to the Center's organizational goals.

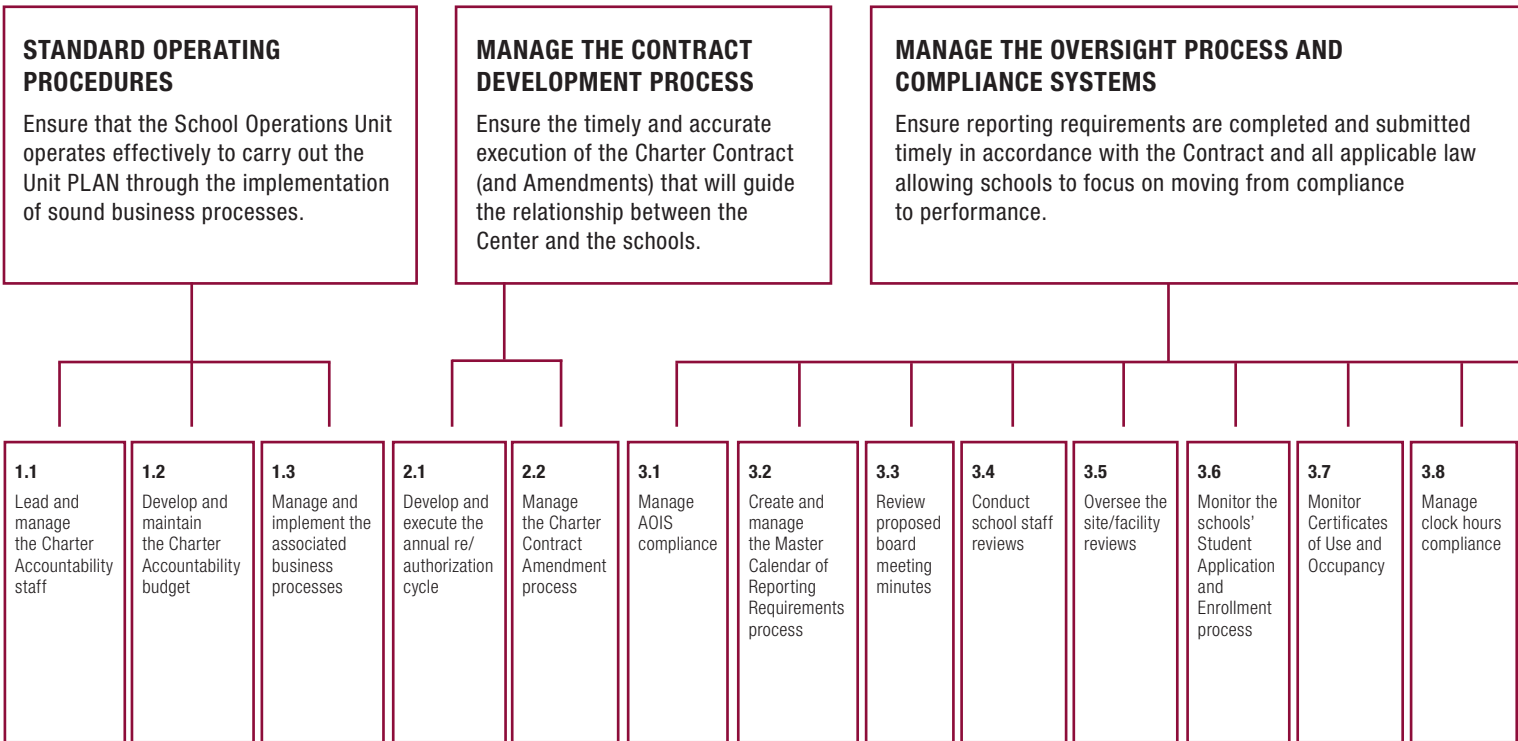
# UNIT PLANNING MAP EXAMPLE:

## CHARTER ACCOUNTABILITY PLANNING MAP

### CENTER ORGANIZATIONAL GOALS



### UNIT GOALS



## COMMUNICATIONS

Develop and implement a communications and marketing strategy, incorporating the Center's branding proposal, to target key audiences and stakeholders to position the Center as the authority and resource on charter schools, school authorizing and quality public education choices.

## DATA

The Center and CMU authorized schools will use essential data that provides for effective oversight, accountability and informed-decision making necessary for improving performance.

## LEADER DEVELOPMENT AND ORGANIZATIONAL CAPACITY

To recruit, retain and develop a team of passionate professionals who are committed to the mission of the Center.

## MANAGE THE DOCUMENT REVIEWS CONDUCTED BY THE CHARTER ACCOUNTABILITY UNIT RELATED TO THE SCHOOL'S ORGANIZATIONAL DOCUMENTS

Ensure reporting requirements are completed and submitted timely in accordance with the Contract and all applicable law allowing schools to focus on moving from compliance to performance.

## MANAGE THE FLOW OF INFORMATION

Ensure Charter Accountability maintains effective communications via direct and indirect methods.

**3.9**

Develop and manage the Notices of Intent to Revoke and Plans of Correction

**4.1**

Review of School Educational Service Provider Agreements

**4.2**

Review of School Facility Lease and Purchase Agreements

**4.3**

Review School and Educational Service Provider Insurance for compliance with Contract requirements

**4.4**

Review educational program documents

**4.5**

Review curriculum documents

**4.6**

Review educational goal documents

**5.1**

Manage the School Complaint process

**5.2**

Manage the creation of Key Points documents

**5.3**

Manage the Charter Accountability portal page

**5.4**

Manage the Charter Accountability content on the Center's website

**5.5**

Communicate timely with applicable regulatory agencies (including MDE, BCC, BFS)

**5.6**

Manage the Operation Performance Report process

UNIT PLAN ASSESSMENT MATRIX (PAM) EXAMPLE:

CHARTER ACCOUNTABILITY PROGRESS REPORT

Center Goal	PLAN Objective/Schedule of Deliverables		Completion Date	On-Time?	Unit Goal (Net Impact)	Metric (critical questions)	Overall
<b>4-3-5</b>	<b>STANDARD OPERATING PROCEDURES</b>						
<b>4</b>	1.1	Lead and Manage the School Operations Staff	30-Jun		Ensure that the School Operations Unit operates effectively to carry out the Unit PLAN through the implementation of sound business processes.	Does the School Operations team have the resources to perform high quality work that is valued and respected?	Through 1 meetings o will assess School Ope the resour perform hi that is valu respected.
<b>3</b>	1.2	Develop and Maintain Charter Accountability Budget				Did the School Operations budget provide the necessary resources to fulfill the unit needs and were year-end expenditures within the approved amounts?	Funds will utilized an Leadership budget.
<b>3,5</b>	1.3	Manage and Implement the associated Business Processes	30-Jun			Are business processes reviewed annually and updated, as necessary, in order to continually improve consistency and efficiencies within the unit?	At least 95 processes updated an accordanc Center's es schedule.
<b>3, 5</b>	<b>MANAGE THE CONTRACT DEVELOPMENT PROCESS</b>						
	2.1	Develop and Execute the Annual Re/Authorization Cycle	30-Jun		Ensure the timely and accurate execution of the Charter Contract (and Amendments) that will guide the relationship between the Center and the schools.	Were the Contracts executed properly, timely and accurately?	Contracts (10) plus _
	2.2	Manage the Charter Contract Amendment Process	30-Jun			Were Contract Amendments executed properly, timely and accurately?	Completed Amendme 2014-2015

**CENTER GOAL ALIGNMENT:**

How do the goals in the plan align to the Center's objectives? This is intended to focus each unit's plans to the Center's objectives.

**DISCIPLINED ACTION:**

Where in the plan is the expected outcome of the disciplined action? This directs the reader to where to find more detail.

**COMPLETION DATE:**

When is the expected outcome of the disciplined action? This aligns to dates established in the plan.

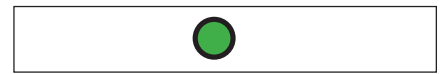
**ON-TIME?**

Was the outcome completed in a timely manner?

**UNIT GOAL:**

What are the overall goals of the plan (what is it trying to accomplish)? Generally, a plan's goals are found in its executive summary. The goals show alignment of the plan's goals to the Center's objectives.

Overall Deliverable	Actual	Status	NOTES
1:1s and unit continual reviews whether the operations team has what it needs to do high quality work and	As of 06/2015, ...		Weekly reports; met monthly with team members for 1:1; attended _____ session(s) as a team; held quarterly reviews to assess overall progress toward the PLAN as well as the overall motivation of the team.
be efficiently and aligned with board-approved	The year-end actual expenditures related to School Operations were within the final Leadership-approved budgeted levels.		Budget amendments were necessary for <line item examples> due to....
% of all business reviewed, and maintained in line with the established	____ Business processes were updated in 2015 - including ____ Charter Accountability (____%) and ____ related to FP&A (____%).		____ Charter Accountability business processes were not updated during 2015 due to ...; ____ FP&A business processes were not updated during 2015 due to ....
for Class of 2015 ____ new schools	____ Contracts were executed properly, timely and accurately.		All Charter Contracts were Board-approved prior to 06/30/20__ and were delivered to MDE within 10-days of being fully executed as required by statute; all standard Contract Amendments were fully executed and routed to MDE by xx/xx/2014; ____ Contract Amendments affecting site additions and/or grade additions were executed properly, timely and accurately and filed with MDE prior to 09/03/2014.
Contract amendments affecting 2015-2016.	____ Contract Amendments were executed properly, timely and accurately.		



**DISCIPLINED ACTION:**

This item has been successfully completed, or is on track for successful completion by its expected time.

**NET IMPACT:**

There has been positive movement toward this goal in the last period.



**DISCIPLINED ACTION:**

Moderate progress has been made on this item, or this item is in progress, but is not currently on track for completion by its expected time.

**NET IMPACT:**

This goal has neither been advanced nor declined.



**DISCIPLINED ACTION:**

This item has not been successfully completed, or is not currently on track for successful completion.

**NET IMPACT:**

There has been negative movement toward this goal in the last period.



**DISCIPLINED ACTION:**

This item has not begun. In other words, a blank means there is nothing to say on this item at this time.

**NET IMPACT:**

A blank is not an option for Measurement of Changes. (Remember, our actions are only one of many things that affect progress toward these goals.)

**METRIC:**

What questions should be asked to determine whether progress is being made to the unit goal (net impact)? These questions can have either quantitative or qualitative answers.

**OVERALL DELIVERABLE:**

What is the impact that was expected? This is intended to provide for a benchmark to measure progress.

**ACTUAL AND STATUS:**

How much progress was made toward the goal? This section is informed by reviewing the established "metrics" and can be simply and graphically represented.

**NOTES:**

Are there any notes about the completion, schedule changes, observations or other elements that should be recorded? These can help inform leadership and also provide direction in plan revisions.

———— THE GOVERNOR JOHN ENGLER ————  
**CENTER FOR CHARTER SCHOOLS**  
———— CENTRAL MICHIGAN UNIVERSITY ————

THE GOVERNOR JOHN ENGLER CENTER FOR CHARTER SCHOOLS  
CENTRAL MICHIGAN UNIVERSITY | MOUNT PLEASANT, MI 48859  
(989) 774-2100 | [www.TheCenterForCharters.org](http://www.TheCenterForCharters.org)